Expense Module Cash Advances
Research Related Subject Payments, or Indigenous Elder/Participant payments

Cash Advance for Research-related Subject Payments or Indigenous Elder/Participant Payments Process

Requesting a cash advance is typically a three-step process:

1. Pre-approval and submission of claim. Obtain approval from your department/PI on the Project to apply for the Cash Advance. Once the individual has obtained approval they will then follow the steps below to create and submit the Cash Advance Request.

   A. Go to the Expense Tab.

   B. Select the Cash Advance Drop down menu, and then New Cash Advance

   C. A new window will opened titled “New Cash Advance” you will need to fill in all the fields – if they are marked with a Red Bar they are required.

   D. Cash Advance Name should include ‘Advance’ + Last Name of requestor + Date. Please note that if you are requesting a Travel Advance, you need to do so through the ‘Request’ tab (not the ‘Expense’ tab)
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E. Business Purpose should include an explanation of the Subject Advance (including how related to research) OR of Indigenous Elder/Participant Payment Advance

F. Start Date should reflect the first date on which you plan to begin disbursing the advanced funds.

G. End Date should reflect the date on which you plan to complete the disbursement of the advanced funds.

H. Once you have filled in all the required information select the orange Submit button in the bottom right corner.

I. Once you have selected Submit you will be prompted to enter in an approver. You will need to search for your one-over-one approver using their Last name. Please ensure that they have the correct signing authority for the project you are submitting the Subject Payment Cash Advance Request for.

2. Review and Approval of the Cash Advance Request by the Approver.

3. Once approved, the cash advance is sent to a Cash Advance Administrator who reviews it and then either issues the cash advance or returns it to the employee (e.g. for more information).

Once the Cash Advance Administrator issues/processes the cash advance (i.e. sends it to PeopleSoft for payment), the cash advance is paid to the employee.

Accounting for the Cash Advance Request

Within 15 days of the completion of the End Date, the individual must create an expense report to account for the Subject Payment or Indigenous Elder/Participant Payment Cash Advance.

Please see the “Expense Report, How to Create” document.

NOTE: The Procedures regarding Payments to Research Study participants can be found on the University Secretariat’s website, through the link below:

https://www.queensu.ca/secretariat/policies/finance/payments-research-study-participants